Title: GIVING AND VOLUNTEERING IN MEXICO: TIME, TALENT AND TREASURE

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Abstract:

It has been until recently that there has been an opportunity to study the conformation of civil society, the number of donations that Mexicans give and the amount of volunteer activity in Mexico. Research (Butcher, 1999) (Verduzco, 2003) (Moreno, 2005) has indicated the need to recognize not only the value of time and effort that individuals give but also the amount of donations of money and in kind that Mexicans are able to give to their community. Several national surveys (ENAFI, 2005, 2008) (ENSAV, 2005) designed to answer the questions of giving both in time and in various resources have emerged in the past decade begin to paint the picture of the reality of Mexican civil society. The first survey was directed towards the issues of donation of money and volunteer time within formal organizations. The second was designed to not only look at these aspects of giving but included those acts of solidarity that are found in informal settings. In Mexico, a recent study (Butcher, 2008) demonstrated that many individuals participate informally, how and why this happens as a common occurrence in developing countries, where on the one hand it is difficult to initiate and sustain a non-profit organization and on the other, the systematization of the “help” or volunteer work that individuals provide still remains lacking.

This paper will present a comparative analysis on several levels of the most recent research on giving and volunteering in Mexico in various key aspects, utilizing three major elements: First, the number of organizations in the country. In 2009, the Mexican government agreed to initiate a Satellite Account based on UN parameters of System of National Accounts to explore and confirm the status and number of the nonprofit institutions in the country. This information will be available as of 2010 for public purposes and will be part of the data analyzed to be able to count the number of Mexican organizations as well as the volunteer
hours individuals donate to various causes.\(^1\) The second element will be the data emanating from two surveys on giving and volunteering, ENSAV and ENAFI\(^2\) mentioned earlier, which are, at the moment, being cross-referenced and compared to establish the similarities and differences amongst the information on volunteer activity. The results of this exercise will set the stage and provide information for the design for the new ENSAV 2010 survey on giving, that will be the follow up, five years later, of the initial work of the Mexican Center for Philanthropy on Mexican solidarity and citizen participation. This design and new survey will be part of this presentation. The third element this paper will contain is relevant information from the current CIVICUS Civil Society Index investigation undertaken by two Mexican NGOs: Cemefi, the Mexican Center for Philanthropy and Iniciativa Ciudadana para la Promoción de la Cultura del Diálogo, A.C. (2008) This exercise will provide a context that has evolved since the last CSI study performed in Mexico in 2000.

There is a need to further advance in the understanding of the panorama of philanthropy, volunteer work and giving in Mexico. In facing the present crises, this sector must be ready to adjust where necessary and use all its resources to be effective and efficient. Comparisons are important to help researchers create methodologies that will deliver precise information on the Third Sector useful for individual, government and corporate decision making. The purpose of this analysis is to present data that will provide insight into how Mexican volunteers perform, how many non-profit organizations exist and how the present day context of civil society influences the necessary changes that should be implemented in reference to the sector.

**Introduction:**

The information about giving and private philanthropy around the world has been the object of interest and research during the past decade. In the nineties, some studies focused on understanding and mapping the Nonprofit Sector worldwide which is the case of the Johns Hopkins Comparative Study. This research project was undertaken by the Center of Civil Society Studies of the same university (Salamon & Anheier, 1996; Salamon, et. al, 1999) from which many derivative studies have also appeared as a natural consequence of the initial research efforts on the sector, acts of philanthropy and the attitudes of volunteer participation as a whole around the world. The investigation shed light on the conformation of the Third sector in various parts of the globe, including Mexico and Latin America. Other studies that have been important are those that have to do with volunteering, reciprocity and solidarity, and these contribute to the understanding and importance of these forms of citizen participation for the public good. They go from those that explore the relationships of the Third sector and the State (Kramer, 1990) to all those that pertain to all the elements of solidarity that conduct public policies within nations. This research has contributed to creating a vast body of knowledge, but has also left new questions to be solved in this arena. As a consequence, the information of all aspects of volunteering, its magnitude, ethnical origins, its

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\(^1\) The current information on the number of organizations in Mexico is based on the Johns Hopkins Comparative study. (Salamon, et. al, 1999)

\(^2\) ENSAV. Encuesta Nacional de Solidaridad Acción Voluntaria [National Survey on Solidarity and Voluntary Action]

ENAFI. Encuesta Nacional de Filantropía [National Survey on Philanthropy]
educational levels and its proportion of gender have also been explored to explain its characteristics (Lucas, 2001, Obaze, 1992; Salamon y Anheier, 1996; Orr, 1982; Schervish, 1993 y Hustnix y Lammertyn, 2003, Butcher, 2010).

For the Mexican case, the analysis of the characteristics of both philanthropy and volunteering and how the population has participated in these activities as well as the history and creation of the Third sector in Mexico has only recently been added to the research agenda of the nation. Some pioneer studies and surveys have undertaken this exploratory path (Verduzco, 2003; Cadena, 2004, Moreno, A., 2005 Gordon, S y Millán, R. 2009; ENAFI, 2005,2008; ENSAV 2005; Butcher, 2008,2010) however, more information has been recently produced to the better understanding of this sector and need to be further analyzed and brought to light in view of the importance that this phenomena has acquired recently in a country that formally has a small Third sector, but at the same time has a population that participates in taking care of its own in various ways.

Due to the recent economic crises that has affected both migration patterns (Merz, 2005) and rising insecurity in the nation, there is a heightened interest in the research community to see how various forms of participation of the population can contribute to enhancing both better relationships among its citizens as well as better relations and understanding with the government in working together to create public policies that will help solve problems that affect all. The main purpose of this paper is to present some of the context of the sector that in the past decade has been discovered as well and some of the advances in knowledge that are actually contributing to the understanding of its possible contribution to the wellbeing of the nation.

In studying the sector, a chart presented in Fig. 1 gives us an idea of what is being considered:
The Mexican Context

In numbers, from a 2008 estimate there are approximately 105 million Mexicans, this year in 2010 there will be a recount for the population census done by Mexican Statistical Agency, INEGI, that will finalize interviews in June of 2010 and the estimate is to add at least 5 million more. In a country where the average income of the economically active individuals is around 8000 USD a year, one cannot imagine the size and scope of the Non for profit or Third Sector to be large or the philanthropic contributions to be of significant amounts. The Johns Hopkins Comparative effort when looking at the size of the workforce (0.4%) as an indicator of the size of the sector reached a very low number. This number is considered low even for other countries in the region and the comparison that surged in this study made a closer look at non for profit activities triggered impending new research need.

When another author includes the World Values study (Inglehart & Basáñez, 2004) plus a questionnaire on both sides of the border of Mexico and the U.S., interesting information begins to appear. What seems to happen is that Mexicans associate three times less than Americans do. “Including trust, an additional element that tends to intensify the studies on social capital is participation in voluntary associations. For starters, if we had to describe the Mexicans on this point, the word nearest to their character would be inactivity”... compared to Americans who do belong to formal groups and associations, so, in comparison... “the average Mexican usually associates into one organization, while the Mexican-American does so in two organizations and the Anglo American in three”. Moreno (2005: 149-155) He does not give us an explanation of this data, because this is not the main focus of the book and even though we encounter very low levels of association, this data tells us that the affirmation is partly true, since we think that people associate to form organizations mostly in formal environments. As usual, it depends on how you design the questionnaire and what people understand when they are questioned. The same WVS study gives us comparative data that tells us approximately the percentage of the population that belongs to formal voluntary groups in Mexico. (Inglehart & Basáñez, 2004)

The size of the sector may have to do with historical reasons and also in relationships with Church and government, issues that have been discussed at length (Méndez, 1999, Verduzco, 2003; Butcher, 2002, 2004, 2010.) but that need be mentioned, since these factors are important to understand the history and formation of the Mexican Third sector as it stands today. The outreach of the sector, its influence, its achievements or its scope and variety of interests had not yet been studied sufficiently to even diagnose the giving and philanthropic situation or the amount of civic engagement.
A decade ago, there was scarce information on what the sector looked like in Mexico, since there had been no real investment of time or resources from the research community or from the governmental point of view, to find out the size and scope of the this sector or how it could affect civic participation or development for Mexico considering other matters as priorities for the country at the time. Volunteer groups and civic participation were not considered as part of progress or development. Many of these kinds of activities were traditionally linked to the Catholic Church, (Verduzco, 2003) and the religious motivation considered as the strongest to belong to organizations or to perform charitable acts. It was looked upon as participation from groups and/or individuals that had no set pattern or specific meaning.

With the democratic transition occurring in 2000 in Mexico, a moment when the authoritarian PRI party which had been in power for 73 years lost to its main counterpart the PAN, interest in how citizens participate began taking on a national scope and questions on civic participation and political issues were added into the ENCUP surveys in 2001, 2003, 2005 and the latest one in 2008, installed by the Ministry of State (SEGOB in Spanish), where the importance of voting, political attitudes and participation took on a new role and became a valid issue to study since polls had been manipulated before this transition. These surveys contain questions that can be useful to find out how Mexicans see their participation in society, the questions go to levels of both interpersonal trust and trust of institutions: public

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### Civil Society Workforce as % of Economically Active Population, by Country

<table>
<thead>
<tr>
<th>Country</th>
<th>All countries</th>
<th>Paid staff</th>
<th>Volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Egypt</td>
<td>2.9</td>
<td>2.8%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Peru</td>
<td>2.5%</td>
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<tr>
<td>South Korea</td>
<td>2.4%</td>
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<tr>
<td>Colombia</td>
<td>2.4%</td>
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<tr>
<td>Uganda</td>
<td>2.3%</td>
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<tr>
<td>Kenya</td>
<td>2.1%</td>
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<tr>
<td>Tanzania</td>
<td>2.1%</td>
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</tr>
<tr>
<td>Czech Republic</td>
<td>2.0%</td>
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<td></td>
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<tr>
<td>Philippines</td>
<td>1.9%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td>1.4%</td>
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<tr>
<td>Morocco</td>
<td>1.5%</td>
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<tr>
<td>India</td>
<td>1.4%</td>
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<tr>
<td>Hungary</td>
<td>1.1%</td>
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<tr>
<td>Pakistan</td>
<td>1.0%</td>
<td></td>
<td></td>
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<tr>
<td>Slovakia</td>
<td>0.8%</td>
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<td></td>
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<tr>
<td>Poland</td>
<td>0.8%</td>
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<tr>
<td>Romania</td>
<td>0.8%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>0.4%</td>
<td></td>
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</tbody>
</table>

Fig 2. Source: Johns Hopkins Center for Civil Society Studies.

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3 86% of the Mexican population is Catholic.
4 PRI, Partido Revolucionario Institucional
5 PAN, Partido Acción Nacional
6 ENCUP, Encuesta Nacional sobre Cultura Política y Prácticas Ciudadanas (National Survey on Political Culture and Citizen Practices)
7 Secretaría de Gobernación
and private. Through the years some questions have been somewhat modified and others added, many of the same ones have been kept to allow comparability. When the results are presented they are also compared with other surveys such as the WVS (World Values Survey) the Latinbarómetro (LB) and Barómetro de las Américas. (BA)

The main questions that can be useful and pertain to activities within the sector such as interest in politics and issues of participative democracy as well as degrees of interest in the democratic process and issues of trust and interrelation with others for the creation of proper social networks, the basis of social capital. Some of the most relevant are questions such as:

- Are you satisfied with democracy in Mexico at the moment?
- In your opinion, who has the power to change things?
- How much do you trust...the President, the army, the church, the judges, the police, the politicians, etc?
- Do you agree with the phrase... In Mexico elections are clean.

In answer to some of these questions. As far as clean elections, 65.8% does not agree with this phrase and 15.7% does. This means that Mexicans still think that elections are rigged and that corruption happens in the polls. It may or not be correct, but it is public perception and the authorities must work hard at making things as transparent as possible for these voting processes to be established.

These surveys have been useful not only for government but for civil society to know what all Mexicans are thinking in attitudes about these issues, and for 2008, we find that things have not changed that much from 2005 until 2008, We find that Mexicans trust the church (72%) and the army (66%) in approximately the same proportion, at least in the high end of the scope and that the police (26%), is not trusted as it is in other parts of the world according to the WVS (56%) and the political parties fall even below that number with 23%. Social organizations are not high up on the list (34%) and this is important to realize that they are not that many and they are not well known either. There is not very much public information on what CSO do and how they benefit the public. This information deficit is something that needs to be taken care of from the CSO perspective.

As far as civic engagement, other questions are taken into consideration:

- Do you get together with others to solve common problems? (22% Yes, 78%, no)
- Do you think that getting together helps solve problems (24.8% a lot, 37.3% some, 30.3%, very little)
- Do you help in solving problems in your community? (10.8% yes, 89.2% no)
- How useful do you think this participation is? (23.2% very, 34.9% some, 38.5% a little, 3.3% not at all)
- The best way to manifest inconformity with government actions is to join in with social organizations (35.9% yes, 13% maybe, 36.5% no)
- Have you ever donated to a cause? (13.1% yes, 86.3% no)
When asked about belonging to organizations (Some examples: 2.3% yes, 96.5% no in service organizations; in religious organizations 11.4%, yes and 87.9% no; schools 19.1% yews and 80.0%, no)

So, in looking at the answers to these questions and the numbers shown here, much can be understood about Mexicans and participation in public issues as well as their attitudes towards government, their feelings towards democracy and the way the country is run. In general, we find a still very conservative country where a large percentage of the population considers itself not very tolerant of gays and lesbians and mostly with a strong religious background that reflects in all its activities, both public and private and basically right wing in politics. This does not necessarily mean that those politicians win because many of these conservatives do not go to the polls. This is important information to stimulate the voting processes.

We also find from the 2008 ENCUP that seven out of ten Mexicans do not trust the political parties and three out of every four Mexicans feel that politicians only look out only for their own interests. We see that people do not participate in groups very easily although they think it is a good idea to do so. We find out that when they do participate, they do so mostly in schools and in religious organizations. This is important information for the progress of civil society and for the formation of organizations in Mexico. Much still has to be done for people to understand the utility and great possibilities that can be reached when citizens unite towards a common cause. A lot of this work should probably come from the CSO themselves, as they need to stand out more in the public eye and explain to the general public not only what they do, but how and how many people they benefit in society.

The CIVICUS Civil Society Index (CSI)

Two Mexican NGOs: Cemefi, the Mexican Center for Philanthropy and Iniciativa Ciudadana para la Promoción de la Cultura del Diálogo, A.C. have undertaken the effort to apply the CIVICUS Civil Society Index (CSI) in Mexico for 2009. Some of the first efforts to engage experts in the country go back to the first CSI (2002) sponsored by Cemefi, where due to the methodology, a real light was not shed enough on the real state of Mexican civil society. A new effort with CIVICUS being engaged and which will be terminated in 2010, a new methodology for the Civil Society Index and different questions hopefully will provide a better picture of the perceptions of Mexican civil society today.

The CSI look to ...“describe an empirical representation of the state of civil society, considering the conditions that enhance or limit its development, as well as the repercussion of its activities”.

Graphically, the end result for the CSI is a diamond on an axis that reflects the state of civil society in a given country which is built on five dimensions:

1) Civic Engagement: The degree of commitment of individuals that participate in social and political organizations.

2) Level or Organization: Degree of institutionalization of civil organizations taking into account infrastructure, governance, communication, resources, international networks, etc.
3) Value Practice: Degree in which civil society practices certain fundamental values: democracy, transparency, environmental sustainability, gender issues, etc.

4) Perception of Impact: Degree of social impact on the creation of public policies on issues such as: education, poverty alleviation, non-violence, trust and tolerance, etc.

5) External Factors: Degree in which external factors either enhances or hinders the development of civil society such as the political, social and economical context.

The methodology this time includes questionnaires and focus groups both for civil society organizations as well as other actors in civil society: businesses and the public at large. The Mexican group applied questionnaires to 320 CSO and to identify them government and private the data bases were used: Cemefi, Iniciativa Ciudadana, Secretaría de Gobernación, Indesol (Cluni) y SAT (Donatarias Autorizadas). The total number in this data base turns out to be of 20,196 CSO.

Questionnaires were also applied to experts, opinion leaders, the media, government officials, academia, business foundations and members of CSO. Also, a household survey to obtain data on the perception of the values and on practices such as volunteering, social movements and other civil society activities. Finally several Case Studies are being prepared to add a qualitative aspect to this study. These have been chosen around the five dimensions that conform the graphic civil society diamond.

In Fig. 3, we see the results of the impact study where it seems that Civil Society has had the greatest impact on levels of insecurity.

![Graph showing impact of civil society on various issues]

Fig. 3. Source CIS, Mexico

Another question has to do with the incidence and influence in creating and crafting public policy, 57.3% answered affirmatively and 41.83% answered negatively, however, what was found is that CSO have a great insight into which public policies are needed but not enough leverage to make these real. The great majority of CSO (44%) felt that the part where they have a better chance in the creation of public policy is in the diagnoses phase. Another question that was important and relevant for the activity of civil society has to do with the existence and restrictiveness of laws that favor civil society action. The result of this inquiry is
that 25% of CSO answered that the legal and fiscal requirements are highly restrictive, 44%
somewhat restrictive, and in the social aspects, less than 40% consider them to be somewhat
enhancing.

Fig. 4 shows that in the opinion and perception of civil society, 57% of the CSO that were
polled answered that their impact on the community is limited and 21% thinks it is non-
existent. This goes to show the low visibility of the actions of CSO and of civil society as a
whole on the influence on public policy decisions and on changing the paradigm of
participation for Mexicans in general.

CSI diamond is built on various elements: the CSO questionnaire, the external actors
questionnaire and the household survey.

The main findings on the focus groups that took place in 6 different regions of the country was
there is a need to:

• Create networks and links amongst CSO to create spacers for dialogue and exchange
• Design citizen participation workshops and citizen awareness programs
• Obtain more recognition from the government towards civil society and CSO needs to
continue to expand and grow so that the resource flow can be better.
• Craft public policies derived from the CSO in the areas of expertise they manage and
look for a better relationship with the Mexican lawmakers.
• Elaborate transparency and accountability programs both for government and for CSO.
• Make CSO more professional
• Visibility strategies are in order to position civil society opinion and importance

The political visibility and aspects of civil society are only beginning to take importance due to
the history of Mexico, mentioned before. On the one hand a long authoritarian rule did not
help towards the evolution of new political counterparts to the reigning party. However, the
public at large, is not used to consider all the new political aspects of lobbying, and
campaigning as civil society activity. Traditionally, helping the poor and the vulnerable was
what CSO did. Now, human rights and all different sorts of political, social and environmental issues are also a part of a vibrant civil society that still needs to understand where it is, how far its power can reach and also get organized enough to stir the direction towards the future.

**Volunteering and citizen participation in Mexico. Two Surveys.**

Other interesting aspects of the ENCUP survey are a basis for other surveys that are more specialized and that are the result on a need for information the sector that these general surveys are not designed for. (Butcher, 2006) ENCUP basically looks into the political inclinations of the citizenry. After getting a general idea of what Mexicans think of participation, new research has gone deeper into donations of time and money. Two surveys that are worth mentioning here are: The ENAFI\(^8\) (ENAFI, 2004) questionnaire in a survey by ITAM\(^9\) university which was designed to find out about philanthropic activity: donations of time, and money. This survey appeared first in 2005 and was re-applied again in 2008 with the same questionnaire and a few added questions on themes that had not been included the first time. The ENAFI survey shows several interesting aspects of giving and volunteering. When asking individuals on their volunteering patterns, first, they were asked if they performed formal volunteer work in any given type of organizations, showing a list of “possible” organizations and groups to work in. This question assumed that the volunteer activity was considered as understood among the citizenry, and based its results on this assumption. Some of the interesting questions that this survey makes to volunteers are:

- During the last 12 months did you do any volunteer work, without pay, for any group or organization? (22% answered yes and 76% answered no)
- Look carefully at this list of organizations where several types are included. Tell mw in which of these you were a volunteer in the last 12 months. (There was a large proportion of volunteerism in schools, 19% in the average of 2005-2008)
- There are many reasons for doing volunteer work, which are yours? (the main answers were: a) to give back something to the community, b) for their religious beliefs c) to help my children in school and d) because it is an opportunity to feel useful)
- Have you been personally invited to do volunteer work in the past 12 months? (23% yes, 76% no)

We can do the numbers if we consider the scope of the survey in the entire adult population of the country. The rest of the questions from this survey go on into asking about donations from individuals and these will be summarized when we talk about philanthropy farther along in this paper to get an idea of how much individuals give vs how much the total donations of the country represent including corporate ones. This survey gives us an idea of organized and formal philanthropy and volunteering. When 26% of individuals answer that they have been volunteers, this also means they belong in some way to a group not necessarily a formal CSO, but a group that gets organized to support certain volunteer activities.

This informality in attitudes and in forming groups and organizations is what became the impulse to prove the hypothesis of how much informality actually occurs in reference to these

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\(^8\) Encuesta Nacional de Filantropía (National Survey on Philanthropy)

\(^9\) Instituto Tecnológico Autónomo de México
activities in Mexico. The ENSAV questionnaire took on another perspective, although it
included many similar questions the ENAFI had on formal volunteering, and donations, its
intention was finding out what people had done during their lifetime and how frequently this
happened, so as to use it to be able to study and follow life patterns of individuals in solidarity
and volunteer practices. This was necessary since no other national questionnaires existed that
would give this information. It followed some of the suggestions of UN Handbook, (2001)
where it specifies the need to see if people understand the word “volunteer”. In many
countries, especially in those of the South, the concept of volunteering is not understood the
same way as in the North and modifications to questions were put into the design to assure
that individuals understood what was being asked. To insure that understanding of the activity
was correct, a prompt was established by the interviewer at the beginning of the
conversation because many Mexicans do not see themselves as volunteers, but in reality they
cover the description of the volunteer concept in giving freely of time and talent, without
receiving pay for their work.

The interviewer presented this small explanation before beginning of the survey...“I am going
to ask you about the help that you give in time and services, or what you gave or give to other
people that do not belong to your family, where you do not receive money in return for your
services and that you have done this voluntarily. It can be any kind of help: teaching someone
to read; organizing events in your community and helping the neighbors, organizing a party for
the school or church, directing a sports team weekly, helping out at the local Red Cross or
giving free medical services; attending someone who is sick, without him being a relative; help
in a religious procession or a local political group; construction for the community. Whatever
benefits others, without receiving pay and in a volunteer fashion”. Then, comes a question...
Was this understood, or would you want me to me to repeat this again?

The ENSAV\(^\text{10}\) (ENSAV, 2005) questionnaire applied by a research group in Cemefi\(^\text{11}\) in a
national\(^\text{12}\) was part of a larger project entitled” “Participación ciudadana solidaria y servicio
voluntario en México,” (Solidarity in Citizen Participation and Volunteer Service in Mexico)
cluded the aspect of donations, but it went deeper into the habits of the individuals and their
attitudes and activities around volunteering formally and informal solidarity practices. This
survey was part of this national study where a qualitative methodology was also applied and as
a result of 65 in depth interviews, 15 case studies emerged from the information of
individuals that worked and volunteered within Mexican CSO. (Butcher, 2010).

Some interesting questions included:

- Have you ever done anything (helped) for others without being paid for it? (34% no,
  66% yes)

\(^{10}\) Encuesta Nacional de Solidaridad y Acción Voluntaria (National Survey on Solidarity and Volunteer
Action)

\(^{11}\) Cemefi stands for Centro Mexicano para la Filantropía. Research team that

\(^{12}\) This research project invited professors and researcher from various institutions: El Colegio de México,
where Gustavo Verduzco participated, The Instituto Mora where María Guadalupe Serna participated
and had the technical support of the Tecnológico de Monterrey, under the supervision of Ernesto
Benavides. Financed by the Centro Mexicano para la Filantropía, A. C. under the coordination of
Jacqueline Butcher.
• Which do you remember? (28% religious; 23% school; 22% community, neighbors and fellow workers; 14% to the sick; 8% the poor; 7% orphans, elderly and indigenous; 5% civil causes; 4% sports and recreation; 4% youth and children; 3% political parties and groups; 3% government and other activities)

• And how did you give this voluntary service (work)?\(^\text{13}\) (29% in organized groups or CSO; 21% alone; 13% with neighbors, friends and co-workers; 3% informal)

• How did you start, did someone invite you? (21% individual; 20% a member of a group; 16% member of family of friend; 5% school; 2% a member of another group; 1% because of community needs; 1% and add on TV, newspaper or radio; 1% just to help someone)

• Are you still engaged on this activity? Why did you leave it? (45% still engaged in the activity; 6% have stopped because of time commitments elsewhere)

• Have you met people and made new friends though volunteer activity? (53% yes, 10% no; 34% answer)

• There are many reasons for helping, which are yours? (21% Help those in need; 11% the desire to help others; 8% giving back to the community; 6% religious beliefs; 5% a way to feel useful; 5% to help my children in school; 3% to do something useful; 2% to meet people and make friends; 2% for personal development)

• In your family, does anyone else give a voluntary service? (55% no; 14% husband, yes; 14% brothers and sisters, yes; 12% children, yes; 12% parents, yes)

• Have you invited others do engage in voluntary activity? (65%, no; 12% relatives, yes; 12% friends; 4% have tried but have not encountered response)

• Do you belong to a group? (76% no, 24% yes)

Other questions pertained also to giving not only time, but in kind and in money and asking individuals if they have received help themselves of any type.

The main ENSAV survey questions are:

Main Survey Questions

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<tr>
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<tbody>
<tr>
<td>1.</td>
<td>Have you ever done anything for other without receiving payment?</td>
</tr>
<tr>
<td>2.</td>
<td>How long ago did you start, or what year did you begin?</td>
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<tr>
<td>3.</td>
<td>How long did you keep at this activity and what year did you stop doing it?</td>
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<tr>
<td>4.</td>
<td>How frequently did you do each one of the activities mentioned here?</td>
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<tr>
<td>5.</td>
<td>In a rough estimate, about how much time a week did you dedicate to this activity?</td>
</tr>
<tr>
<td>6.</td>
<td>What did you do, what kind of activity?</td>
</tr>
</tbody>
</table>

\(^{13}\) This question applied to the universe that had answered positively.
7. And how do you give this voluntary service: in an institution or an organized group, or something more informal like working with neighbors or people in your workplace, or by yourself?

8. How did you start, did someone invite you?

9. Are you still doing this today? (NO) Why did you stop?

10. How old were you when you started this voluntary activity?

11. How old were you when you started the last activity?

12. In general, have you made many friends through volunteer activity?

13. Do you think that you learned anything new with these volunteer activities for others?

14. There are a lot of reasons for doing things for others, what are yours?

15. What would you say is the main reason for not doing things for others?

16. In your direct family: husband/wife, parents of brothers & sisters, does anyone participate in voluntary activity?

17. How many in total are the ones that have done so?

18. Have you ever invited your relatives or other people to give some of their time in these service activities for others?

19. What activities have you invited them to?

20. Do you ever give money or things to people that are not your relatives?

21. In general, how do you give this: directly, to an organization religious or not, or in some other way?

22. How much would you say you give a month?

23. How do you give it? (coins/bills/checks/credit card/monthly quota/other)

24. Have you received any help from others? What? How?

25. Who did you receive it from?

26. Do you remember when you received it?

**Attitudinal Questions**

In addition to the main questions, a series of attitude questions were included. These are related to citizen participation and voluntary activity and are used in most questionnaires of this type.
Do you belong to a group? Which?

Is it an institution or an organized group or a group of neighbors or friends, people from work, or acquaintances, or what is it?

I am going to read a list of institutions. Tell me for each one, how much do you trust them?

Would you say that you can trust most people or that you or that you cannot trust everyone?

I am going to read you a list of activities and you tell me if you do them regularly, you did them at some time in your life, or if you would do them or if you would never do them.

If you think about all the free time you have during the week, weekends included, more or less how many hours in the week do you think you have left of free time?

How probable or improbable do you think it would be that you would give it?

If you could do it, how much time do you think you could give to this cause a week?

During the past 12 months, could your family put some money away, did you barely made ends meet, did you spent some of your savings or had to borrow money?

How do you think your personal economic situation is going to be a year from now: better or worse?

On a scale of 1 to 10, where 1 means “it depends on you” and 10 means “it depends totally on the general situation” and you could choose an intermediate number, on which of these does it depend that your economic situation gets better?

How do you find out about the news on TV, radio, papers or talking to other people?

On average, how much TV do you watch a day?

Crossing this information with both the ENCUP and the ENSAV surveys, we find corroboration of information that allows us to affirm certain customs Mexicans have around these issues. We also find that the lion share of activities go to the Catholic Church and related organizations. The sequence is: first to the Church, then to schools and then to the community. For those that are not religious, the order is: community needs first and then to schools. We find that Mexicans do not generally belong to groups and prefer to work alone in these activities, and that informality is higher that formality as far as volunteering is concerned. The ENSAV survey also gave information on amounts and types of volunteers classifying them as “intense” (8% of the contestants that work 8 hours a day every day), “typical” (32% of volunteers that work

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14 This number relates to the 66% of the population that answered affirmatively to the questionnaire, which makes them 100% for this question.
from 2-3 times a week to once every two weeks, in 3 hours at a time) and “infrequent” (Once a month to several times a year) and this is the largest group; 59%

Volunteer Typology

<table>
<thead>
<tr>
<th>INTENSE</th>
<th>TYPICAL</th>
<th>INFREQUENT</th>
<th>NON-VOLUNTEERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>8% OF SAMPLE</td>
<td>WORK FOR THE CHURCH</td>
<td>TIME GIVEN: 1.05 DAYS A YEAR</td>
<td>LACK OF TIME &amp; INTEREST</td>
</tr>
<tr>
<td>MORE WOMEN (69%)</td>
<td>HAVE A RELIGIOUS MOTIVATION</td>
<td>59% GIVE PHYSICAL WORK</td>
<td>HALF MEN AND WOMEN</td>
</tr>
<tr>
<td>GIVE “PERSONAL ATTENTION”</td>
<td>DONATES THE MOST MONEY - CLOTHES -FOOD</td>
<td>LESS TRAINING AND TEACHING</td>
<td>DOES NOT GIVE MONEY</td>
</tr>
<tr>
<td>AGE RANGE 30-49</td>
<td>HAVE MADE FRIENDS THOUGH VOLUNTERING</td>
<td>SAME PROPORTION OF MEN ADN WOMEN</td>
<td>SCHOLARITY IS SLIGHTLY HIGHER</td>
</tr>
<tr>
<td>LESS MONETARY HELP FROM THE GOVERNMENT</td>
<td>RECEIVED THE MOST HELP FROM CHURCH &amp; GOVERNMENT.</td>
<td>DONATES CLOTHING AND FOOD DIRECTLY</td>
<td>THE YOUNGEST OF THE POPULATION STUDIED</td>
</tr>
<tr>
<td>SOcio-Economic Stature in Median Wages</td>
<td>Socio-Economic Stature in Median Wages</td>
<td>The Least Church-Going</td>
<td>Socioeconomic Stature is Also Higher</td>
</tr>
<tr>
<td>INTENSE</td>
<td>TYPICAL</td>
<td>INFREQUENT</td>
<td>NON-VOLUNTEERS</td>
</tr>
</tbody>
</table>

Information in both these and other surveys, such as the ENOE, a national labor survey, which finds out how many hours Mexicans work have been used to try to paint a larger picture of the non for profit sector in Mexico. What can be learned from these surveys is what has to

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15 Encuesta Nacional de Ocupación y Empleo
be done to enhance participation, and to break inertia, bring up levels of trust in government and in others and to teach in schools and in communities the value of working together voluntarily for a common cause. Both civil society and government need to understand where the potential opportunities are for having people interact and create the social capital that is needed for the country to progress into a better and more equal society.

In a 2006 UNDP/Sedesol Social Capital survey in cities that asks about the issue of trust in Mexico. All surveys mentioned in this paper also ask this question and obtained similar results. In answer to the question: Would you say that you can trust most people or that one must be careful of others? 68.5% responded that they must be careful of others. This is the lowest of all Latin American cities in 2006 which are 22% and 26% respectively. 48.5% of the respondents to this survey say that people help less than the previous year, and the main reason is because of lack on financial resources to help out (42.3%). Most Mexicans rely on their family and close friends to ask for help in lending money or is helping their own to get work.

As far as belonging to groups and associations, the answer is that 23.5% of individuals (in cities) belong to a group in which 43% have given time and 42.7% have given money. Here most people (75.3%) have belonged to their organizations for a long time, more that 10 years. People also give more time than money. Those that belong to groups usually belong to the same socioeconomic levels and the reason some people do not join is that they have not been invited to do so. Most people that belong to organizations perform a democratic process within their organizations.

When the survey portrays collective action, comments are that the main barrier to participation is educational differences, but at the same time we see that in 2006, 17.2% of Mexicans in cities have organized themselves to call attention to a specific problem in their communities, 21.7 have resolved a community problem and 63% of the people that had lived in the same place for over a year helped solve problems in their respective communities. Finally the survey tells us that in general Mexican are law abiding citizens only when they believe that it coincides with the way they think.

All this information on how Mexicans perceive themselves and how they perceive their relationship with others and with their own government should be used for both authorities and civil society to become aware of the changes that should be made to create better social capital and promote a democratic society. To respond to the needs of change in participation, and to elevate the trust of Mexican in their own authorities, several new government institutions have been created, one the electoral institution IFE which issues a voters card that is now the main identification for adults in the country and in recent years, due also to the needs for transparency, the IFAI, which makes government instances to give public access to government information, something not observed before the turn of the millennium.

At the same time, CSO, have taken on a new perspective in relationship with the government, since the controls on how much money they receive and how they receive it, becomes

16 Encuesta sobre Capital Social en Medio Urbano
17 Instituto Federal Electoral
18 Instituto Federal de Acceso a la Información
important. The Secretariat of Revenue, (SHCP)\(^{19}\) has always had the control on the deductibility of donations. For the year 2009, the numbers of CSO were well over 6000. These estimates find themselves in different groups divide associations into several categories:

- a) Political associations and parties 117
- b) Religious associations (churches, prayer houses, and community participation) 6,806
- c) Mutual benefit associations 6,659
- d) Social and civil society associations that benefit others 19,428

A very small amount, considering that in our calculations of around 33,010 civil organizations exist, and that only 20% of them can offer tax deductible receipts. (Cemefi, 2009). Here again, if a CSO wishes to receive money from the government for any kind of project, it must bear another register, initiated in 2004 which is called a CLUNI\(^{20}\). Interestingly enough, the trend occurring is that many organizations do not bother to offer tax deductible receipts and new organizations fill in the requirements for the new registration and only solicit money from the government. This register takes place in the National Institute of Social Development, INDESOL\(^{21}\), which is part of the social development secretariat. This discourages the CSO that have to register in both places to be able to give receipts to the private sector as well as fulfill the government standards. This also means that new organizations are forming around government money as their only source of revenue, not a good sign because their revenue source should be diversified for them to be independent from the government and sustainable in the long run. The registration is now running above the 10,000 mark line which amounts to almost a third of the total of CSO in the country.

- **Donations and philanthropy in Mexico**

Private donations are a different matter. The registration of private donations in the country for 2009 amounts to 32,977,175,369.00 pesos\(^{22}\), an amount equivalent to the budget of one of the national secretariats. It is a large feat for such a small community. This is taking into consideration both money and in kind gifts that corporations, for example can deduce from their tax reports.

The government in Mexico is not the first donor to CSO, nor is the general public, neither in donations. CSO have their sustainability thank to the services they offer society. One of the big challenges in Mexican society is to instill the culture of giving, outside of Church donations in all aspects and to all causes.

In this chart we find that 85% of money that CSO receive comes from services that they provide to the public, 8% from the public Sector and 7% from donations and the private sector. If we compare them to other countries as this chart indicates, the differences are enormous, in

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19 Secretaría de Hacienda y Crédito Público
20 Clave Única de Registro
21 Instituto Nacional de Desarrollo Social
22 Reported by the SHCP in 2009 as to donations received in 2007
countries where there is also a small donation group as in the cases of Belgium and Ireland, the government definitively makes up for that amount.

The already mentioned surveys of ENAFI and ENSAV reveal a little more on how Mexicans give. We have found out they give mostly money and clothes and that they prefer to give it directly to the person, instead of to institutions set up for receiving them. They also prefer to give change and this is why the campaign of getting money on the street is probably the best one. The Red Cross the most recognized and trusted CSO in Mexico (ENAFI) sets out its street campaign every year and gets the bulk of its donations in this manner. Of those that do give regularly, their donations are small. Up to 20 pesos is 80% of those who give.

In an interview of Fernando Landeros, (2010) director of Telethon, Mexico, a campaign that gets money for the disabled his indicators tell him that the bulk of the money, up to 75% he receives, comes from small donations less than 5 pesos that people give that day. Of course this is a nationwide TV campaign, and the only one of its kind in Mexico. The media is quite off limits for any type of nonprofit campaign except those that are the TV foundations. One TV station, TV Azteca does have a program to let CSO talk about their work and solicit donations as a result of a TV appearance. Most CSO organize their own funding campaigns for subsistence.

New advances in research and numbers in Mexico for the Third Sector. INEGI.

In February of 2009, the Mexican statistical agency, INEGI\(^\text{23}\) was asked by the Citizen Advisory Council presided by the First Lady, Margarita Zavala, to establish a satellite account for nonprofit organizations. The three main pillars and sources of information for this account are

\(^\text{23}\) Instituto Nacional de Geografía y Estadística
the results of the Economic census of 2009, the 2009 survey of non-profit institutions (ENISFL\(^{24}\)) and the ENOE labor survey, mentioned earlier. What will be obtained in these three sources will be the following information: from the Economic census a) production, b) intermediate consume c) valor agregado bruto; from the ENISFL a) Volunteer Work b) Non Market production c) Financial Balances; from the ENOE a) Salaries by groups of activities. As additional information will be provided by two types of accounts: goods and services and institutional accounts which will provide both religious and political associations information and well as non-profits that serve households.

After a period of careful planning, the activities to date have been to check 110,000 registers on Civil Associations (A.C.\(^{25}\)) and the 813 subsector to conclude in the size of the universe which is of 28,736 establishments. The Un Handbook for Non-profit Satellite Accounts to take into consideration international recommendations and was to study how other countries have gone about establishing these accounts. The next steps were to determine the questions that were utilized for the ENISFL survey. Both Mexican surveys mentioned in this paper and suggestions from the Handbook were taken into consideration for the questionnaire of this survey.

A technical work group with several public and one private institution was established using the collaboration of the DIF, the Mexican Center for Philanthropy (Cemefi) the Johns Hopkins Center for Civil Society Studies of the Johns Hopkins University by adopting the UN Handbook for non-profit satellite accounts elaborated by them and the National Institute of Social Development (INDESOL\(^{26}\)).

The satellite account responds to the National Government Plan 2007-2012 (PND\(^{27}\)) in its strategies 17.1 which proposes to “concentrate the development of programs and projects between government and civil society groups whose objective is to attend those groups in society that are more vulnerable” and 17.8 which promise to “give access to persons in positions of vulnerability to social protection networks” and in reaching the Millenium Development Goals (MDG\(^{28}\)) (IC) which states “to reduce by half, between 1990 and 2015, the percentage of people that live in poverty”.

The utility of the results are also highlighted though this account the following information will be available:

1. Groups of activities where Non profits proliferate
2. Third Sector Vocation: Finding out the orientation of the work of non profits in Mexico in helping others, self-help and societal issues
3. Percentage of nonprofits that generate non market production of goods and services. Services that are free or not economically significant
4. Indirect beneficiaries of government. Making the quality of life better by transferring funds from the government to non profits

\(^{24}\) Encuesta Nacional del instituciones sin Fines de Lucro
\(^{25}\) Asociaciones Civiles
\(^{26}\) Instituto Nacional de Desarrollo Social
\(^{27}\) Plan Nacional de Desarrollo
\(^{28}\) Millenium Development Goals
5. Percentage of non profits with market production. Social investments like schools and private hospitals.
6. Participation of the nonprofit GNP to the national GNP
7. Percentage of paid and non paid workers in the non profits vs numbers of employees.
8. Number of volunteers and their worth in paid jobs equivalents
9. Economic generation of volunteers
10. Find out which activities concentrate the largest number of volunteers (MDG)
11. Find out which nonprofit activities concentrate the largest number of employees (MDG)
12. Indicators of financing of non profits both nationally and internationally
13. Sustainability of non profits by types of income: fees, sales and donations
14. Financing of non profits by other sources (households, government and other non profits)

At the same time this information is obtained, on the 5th axis of the National Development Plan 2007-2012, the objective is to help develop the civic-political culture of the country by offering economic information about the origin and uses of financing non profits, thus fomenting transparency and accountability so “it can be a part of the essential attitudes and permanent behavior of businessmen, civil society, political parties, syndicates, public servants and citizens”

Several questions were taken into consideration for the questionnaire in the ENISFL survey. These are from the ENOE and they are...

1. If you have more than one job, or provide work in other places...
2. In the past week how much time did you dedicate to the community. (here there is a large list of option to choose from: Church, communal activities, helping in food drives or honorary posts, etc.)

The ones taken from the ENUT29, (the National Survey on the Use of Time)

1. Did you provide any free services to your community or to help the environment?
2. Did you participate in any paperwork to get water, light or sewage in your community?
3. Did you participate in any social activities or in any civil or political activities in your community?

These are some of the examples that were used to design the ENISFL and here we are presenting some of the main questions of this survey, applied at the end of 2009. The results are coming out this year and will be those used for the Mexican Satellite Account. It is important to note that this survey goes beyond a mere questioning of individual giving, since it is geared towards “establishments”. These are understood as those who have a legal structure. In Mexico nonprofit institutions can take on different legal frameworks: A.C30, civil association; I.A.P31, Institution of Private Assistance; I.B.P32, Institution of Private Beneficence. There are a few others, but these are the most common, and all need to present reports to the

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29 Encuesta Nacional sobre el Uso del Tiempo
30 Asociación Civil
31 Institución de Asistencia Privada
32 Institución de Beneficencia Privada
Ministry of Finance. Those that can give tax receipts are under strict vigilance of this Ministry. Every year CSO must apply and cover a series of requisites to have the opportunity to offer these receipts to their donors.

The ENISFL survey has 30 questions that cover various themes: fundraising, organizational structure, volunteerism, and employment in nonprofits. Its target is the whole Third sector so as to include all kinds of CSO. This survey also asks about who the beneficiaries of the CSO are and how their networks work. The advantage of this survey is that INEGI is a well respected agency by the public at large and the response rate is high. It is in charge of all major surveys for all the Secretariats as well as the household census every ten years. It was created to provide the government with whichever information it requires. To establish a satellite account for nonprofits is a major step in government/CSO collaboration. It is the first time the government has agreed to map and consider the Third sector and the numbers obtained from this account will produce information for government, CSO, universities and public at large. It now has a Board of Directors and is as of 2009 an independent institution and the commitment is to establish this account and continue to look for information that will strengthen its content.

There has been a preparatory time to consider all concepts and definition of diverse types of CSO in Mexico and all of those that belong to the Third sector. This is also the first time information on religious and political associations will be considered. The flow of resources: in time, money and in kind will be classified for the first time in the country. Also, the international classification (CIOSFL, in Spanish, ICNPO in English) for nonprofit institutions have been applied so as to have comparability with likewise organizations in other parts of the world. These consider 12 themes which are: 1) culture; 2) education and research, 3) health, 4) social services, 5) environment, 6) development, 7) civil rights and legal counseling, 8) philanthropic activities, 9) international help, 10) confessional religious, 11) business association, 12) others.

The ENISFL questionnaire was designed for establishments to answer to all aspects of giving and participating: this includes not only donations but activities of volunteers and employees within organizations, as well as beneficiaries of CSO. Its main structure includes several aspects:

I. **ORGANIZATION**
   - Classification of kinds of activities: education, training, etc.
   - Legal Status
   - Beneficiaries of the activities of the organization: localization, services received, etc.

II. **HUMAN RESOURCES**
   - Composition of Board of directors
   - Employees
   - Volunteers

III. **DONATIONS**
   - Number of donors

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33 Clasificación Internacional de las Instituciones Sin Fines de Lucro
34 (ICNPO) International Classification of Non Profit Organizations
The following charts add up the latest information that is available at this moment in the research project that pertains to building the Mexican Nonprofit Satellite Account. They show how the majority of the sector is dedicated to “serving others”.

### Estimation and composition of the sector

<table>
<thead>
<tr>
<th>Type of beneficiaries</th>
<th>Number of establishments</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mutual Benefit</td>
<td>8,391</td>
<td>29.2</td>
</tr>
<tr>
<td>Help others</td>
<td>20,345</td>
<td>70.8</td>
</tr>
<tr>
<td>Total</td>
<td>28,736</td>
<td>100.0</td>
</tr>
</tbody>
</table>

**SOURCE:** INEGI. Estimate according to the database ENISFL of June 16, 2010
SOURCE: INEGI. Estimate according to the database ENISFL of June 16, 2010

**Sector composition**

<table>
<thead>
<tr>
<th>Employed Personnel</th>
<th>Mutual Benefit</th>
<th>%</th>
<th>Help others</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paid¹</td>
<td>94 560</td>
<td>47.0</td>
<td>263 101</td>
<td>48.7</td>
</tr>
<tr>
<td>Volunteers²</td>
<td>106 519</td>
<td>53.0</td>
<td>277 087</td>
<td>51.3</td>
</tr>
<tr>
<td>Total</td>
<td>201 079</td>
<td>100.0</td>
<td>540 188</td>
<td>100.0</td>
</tr>
</tbody>
</table>

SOURCE: INEGI. Estimate according to the database ENISFL of June 16, 2010
Finally, it must be said that what will feed into this account of new information also very important. Some of this data that will be obtained from the ILO *Manual on the Measurement of Volunteer Work*. This manual is being produced to be able to measure the amount of volunteer work around the globe in adding a number of questions on to the labor surveys already in place.

For the elaboration of this manual and for the questionnaire that the manual portrays, a Technical Expert Group was formed mainly of statisticians and of researchers that had studied the volunteer phenomena.

This questionnaire is part of the Volunteer Measurement Project of the Center of Civil Society Studies at the University of Johns Hopkins and can be found at the institutions website for further referral. The questions are designed to find out the amount of hours individuals work aside from their regular employment.

A few Examples are:

So far I have been asking you about paid work. The next few questions are about unpaid non-compulsory work that you did, that is, time you gave without pay to activities performed either through organizations or directly for others outside your own household.

>Note: Work is understood here to be an activity that could, in principle, be done for pay.]  
>Note: Reimbursement of expenses does not disqualify an activity.

In the last four weeks [provide dates marking the period] did you spend any time on this kind of unpaid activity?

*If yes, proceed to WORK_02. If no, proceed to PROMPT_01*

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35 [www.ccss.jhu.edu](http://www.ccss.jhu.edu), Volunteer Measurement Project at the Center for Civil Society Studies, University of Johns Hopkins
The prompt has been added because contestants, as in the case of some individuals in developing countries, may not have the correct perception of the word “volunteer” and this will aid to pick up the data on their activities.

**PROMPT_01**  Sometimes people don’t think of some activities as unpaid work. I will read you a list of examples of this kind of activity. If you gave any time without pay to these activities during the past 4 weeks [provide dates marking the period], please respond with a “yes” to each of these as I read them. Otherwise say “no.”

**PROMPT_02**  Did you do any unpaid work for a community organization, such as fundraising, providing administrative support, or serving on the board of a school, library, health care center, NGO, club, union, church, or association?

___yes/____no

[Note: The specific examples of activities considered in-scope may vary from country to country, however the overall types of activities should remain the same in order to maintain international comparability.]

Conclusions

The term “social capital” coined by Putnam a decade ago and has come to induce studies and reflection around the globe on the importance of activities such as philanthropy and volunteering. They also permeate the issues of social responsibility in all areas of individual action as well as business and government activities.

It becomes evident as more information appears on how citizens get involved in their communities and how they choose to give to them is becoming an important factor not only in development of nations but in items that enhance social cohesion. What also becomes evident is that there are many ways to participate into creating lively and healthy societies and that all of these formulas of citizen participation must be explored to understand what has happened in the past to be able to build for the future.

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